



ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

Petition for Termination of Guardianship

See petition for details.			NEEDS/PROBLEMS/ COMMENTS:
			1. Need Notice of Hearing.
			2. Need proof of service of Notice of Hearing at least 15 days prior to the hearing on the minor and all relatives pursuant to Probate Code §1460(b)(5) <u>or</u> consent and waiver of notice:
	Aff.Sub.Wit.		- Andrea Arreola (Minor)
✓	Verified		
	Inventory		- Ricardo Arreola (Father)
	PTC		
	Not.Cred.		- Olivia Torres (Mother)
	Notice of Hrg	x	
	Aff.Mail	x	- Ricardo Arreola, Sr. (Paternal Grnadfather)
	Aff.Pub.		
	Sp.Ntc.		- Theresa Acosta (Paternal Grandmother)
	Pers.Serv.		
	Conf. Screen		- Grace Hernandez (Maternal Grandmother)
	Letters		
	Duties/Supp		- Siblings age 12 or older
	Objections		
	Video Receipt		
✓	CI Report		Reviewed by: skc
	9202		Reviewed on: 6/9/15
✓	Order		Updates:
	Aff. Posting		Recommendation:
	Status Rpt		File 5 - Arreola
	UCCJEA		
	Citation		
	FTB Notice		

		JOYCE V. DAVIS, Sister and Conservator of the Person and Estate with bond of \$333,000.00, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: Minute Order 3/25/15: Counsel reports that he has been retained by Ms. Davis. Mr. Bickel is in agreement with coming in as conservator of the estate. Counsel will be filing a corrected I&A and a Third Amended First Account. Note: A corrected I&A was filed 5/7/15. A Third Amended First Account has not yet been filed. The following issues remain noted for reference only: 1. Petitioner's First Account filed 5-15-14 was not in compliance with applicable law, and was denied on 6-24-14. This "Petition for Instructions" filed 8-18-14 requests authority to sell various assets; however, it does not contain the information necessary for the Court to consider this type of request. Further, the Court may require the First Account to be settled before authorizing further action by the Conservator. See Probate Code §§ 1020, 1060, 2540, 2620, Cal. Rules of Court 7.575, Local Rule 7.1.1.C., and other applicable law and rules. Specifically, §2540 requires that the sale be discussed with the Conservatee. 2. Based on the Inventory and Appraisals that have been filed, Petitioner's bond of \$333,000.00, based on her original estimate, is insufficient. Petitioner is reminded of her duty to increase bond pursuant to Cal. Rules of Court 7.204. Examiner calculates the appropriate bond amount to be \$502,194.24, not including the house, and also not including the vehicle that Petitioner refers to, because it has not been inventoried as an estate asset. If the house and vehicle are authorized to be sold, the bond amount will need to be adjusted accordingly. 3. The Conservatee is entitled to notice of this petition. See Probate Code §1460. (Note: <u>Petitioner mailed notice of the amended account at Page B to the Conservatee, but not this petition.</u>) Reviewed by: skc Reviewed on: 6/9/15 Updates: Recommendation: File 6A - Thomas
Cont. from 093014, 102214, 121014, 032515		Petitioner requests to sell the conservatee's real property and vehicle because funds are needed for her upkeep.	
Aff.Sub.Wit.		Note: The vehicle referred to in this petition has not been inventoried as an asset of the conservatorship estate.	
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			

		<p>JOYCE V. DAVIS, Sister and Conservator of the Person and Estate with bond of \$333,000.00, is Petitioner.</p> <p>Account period: 3-14-13 through 3-14-14 Accounting: \$866,751.47 Beginning POH: \$ 11,334.12 Ending POH: \$780,811.53</p> <p>Conservator: No compensation requested</p> <p>Petitioner states the conservatee's automobile has not been sold. The car was used to transport the Conservatee and her six dogs to the veterinarian and to the pet store for food. The car has only been driven by the Conservator's husband with the Conservatee for this purpose. He took the car in for all recalls and maintenance. The insurance company was notified that the conservatee's (sic) husband would be the only authorized driver. The vehicle will be sold as soon as Conservator can obtain the pink slip. The DMV will not issue a new pink slip. The Conservatee did not file the Lien Satisfied/Legal Owner/Title Holder Release with the DMV. The vehicle was paid off several years ago, and the conservator wrote to Toyota, but has had no response. Conservator will follow up on this.</p> <p>Petitioner states the home located in Chino Hills, CA, was in need of major cleanup and repairs due to Conservatee living there for years with health issues. Conservator has secured the property and has begun cleanup and hopes to sale the house because Conservatee will be unable to return to her home in the future. Funds will be used for her placement at Somerford Place. The condition of the house prevents it being rented, and there is no income being generated from the property. No furniture or furnishings have been sold or removed from the house. Conservator has begun to contact auctioneers and antique dealers.</p> <p>Petitioner requests that the First Account be settled, allowed, and approved as filed, and all acts and proceedings of Petitioner be confirmed and approved.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Minute Order 3/25/15:</u> Counsel reports that he has been retained by Ms. Davis. Mr. Bickel is in agreement with coming in as conservator of the estate. Counsel will be filing a corrected I&A and a Third Amended First Account.</p> <p><u>Note:</u> A corrected I&A was filed 5/7/15. A Third Amended First Account has not yet been filed.</p> <p>The following issues remain noted for reference only:</p> <p style="text-align: center;"><u>SEE PAGE 2</u></p>	
Cont from 121014, 032515				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			w/o
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			3-22-13
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input checked="" type="checkbox"/>	CI Report			
<input checked="" type="checkbox"/>	2620(c)			
<input type="checkbox"/>	Order	x		
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			

NEEDS/PROBLEMS/COMMENTS:

1. Petitioner's Summary of Account states the beginning Property On Hand was \$11,334.12; however, it is unclear what this figure represents, as there is no schedule showing Beginning Property on Hand. The I&A and Supplemental I&A totaled \$781,540.22, of which \$397,060.22 was cash. That should be the beginning Property On Hand figure.

Further, the Summary then indicates \$20,000.64 in additional property received, \$55,189.81 in regular receipts, \$501.04 in gains, and \$779,725.86 as "other charges," which are all similarly unclear.

Further, it appears that many of the assets Petitioner originally categorized as "cash" are now categorized as "non-cash" in the Ending Property on Hand, and if that is the case, those assets require appraisal by the Probate Referee. See Probate Code §8900 et seq. This includes the characterization and appraisal of the retirement account and various insurance policies.

Need further amended account pursuant to §1060 et seq., and possibly amended I&A pursuant to §8900 et seq. Petitioner is strongly encouraged to seek assistance from an attorney going forward, as it continues to appear that non-attorney document services are not meeting her needs.

2. As noted on Page A, Petitioner's bond appears insufficient. However, it appears clarification regarding #1 is necessary above in order for to confirm an appropriate bond calculation. As noted on Page A, Examiner calculates that bond should be at least \$502,194.24, not including the house (because the Conservator does not currently have authority to sell the house) and not including the vehicle (because it was not inventoried as an asset of the conservatorship estate). Petitioner is again reminded of her duty to apply for increase in bond when appropriate pursuant to Cal. Rule of Court 7.204.
3. Petitioner's descriptions of various expenses are not sufficient to determine what the expenses were for. Specifically: "SIGNON" on 3-18-13, "AT HM REWA" on 3-26-13, and "PWA" on 4-15-13. Please note: Petitioner's other disbursements at various stores such as Costco and Target are similarly unclear; however, Petitioner provided pages and pages of copies of receipts thereafter. For future reference, copies of receipts are unnecessary and serve to add bulk and confusion to the accounting document. If properly prepared, receipts are unnecessary because the accounting should simply provide adequate descriptions of the transactions in the schedules. The only required documentation are bank statements and care facility statements pursuant to Probate Code §2620, unless otherwise requested by the Court.
4. The Disbursements Schedule indicates two donations to Greenpeace totaling \$100.00 in March and April 2013. The Court may require clarification with reference to Cal. Rule of Court 7.1059 (Standard of Conduct for Conservators of the Estate), specifically (b)(3), which prohibits making gifts with conservatorship estate funds without authorization.

8

16 Daniel Zavala (Spousal)**Case No. 15CEPR00262****Petitioner: Maria Lourdes Delgado Segura (pro per)****Spousal or Domestic Partner Property Petition (Prob. C. 13650)**

DOD: 4/15/2014		MARIE LOURDES DELGADO SEGURA , surviving spouse, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		No other proceedings	Continued from 4/27/15. As of 6/9/15 the following issues remain:
Cont. from 042715		Decedent died intestate or testate?	1. Petition was filed using a Fee Waiver. Filing fees are considered to be costs of administration. Therefore, before the court signs an order allowing the property to be distributed the filing fee must be paid.
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified	Petitioner states does not allege any facts for the court to determine the property either passes or belongs to the surviving spouse.	2. #1 of the petition does not include the petitioner's name.
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		3. #4c of the petition was not answered re: intestate or testate.
<input type="checkbox"/>	Not.Cred.		4. #5a(2) of the petition was not answered re: issue of a predeceased child.
<input type="checkbox"/>	Notice of Hrg	X	5. #5b of the petition was not answered re: step or foster child.
<input type="checkbox"/>	Aff.Mail	X	6. #6 of the petition was not answered re: survived by parents, siblings or issue of deceased siblings.
<input type="checkbox"/>	Aff.Pub.		7. Petition does not allege any facts for the court to determine that the property should pass to the surviving spouse. (Item #7 of the petition).
<input type="checkbox"/>	Sp.Ntc.		8. Need attachment 7a or 7b describing the property petitioner is requesting the court determine the property passes or belongs to the surviving spouse.
<input type="checkbox"/>	Pers.Serv.		9. #9 of the petition is not completed.
<input type="checkbox"/>	Conf. Screen		10. Need attachment 11 listing the names and addresses of all persons interested in the trust who are entitled to notice.
<input type="checkbox"/>	Letters		11. Order is incomplete.
<input type="checkbox"/>	Duties/Supp		Reviewed by: KT
<input type="checkbox"/>	Objections		Reviewed on: 6/9/15
<input type="checkbox"/>	Video Receipt		Updates:
<input type="checkbox"/>	CI Report		Recommendation:
<input type="checkbox"/>	9202		File 16 - Zavala
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

DOD: 4/23/02		LAVONIA FURLOW-WALKER and LILLIAN M. HOLMES , Daughters, are Petitioners. 40 days since DOD No other proceedings I&A: \$60,000.00 (real property located at 1225 Klette Avenue in Fresno) Will dated 7/31/84 devises the estate to the decedent's three daughters, Lavonia Furlow-Walker, Lillian M. Holmes, and Georgia Ann Portee. Petitioners state Georgia Portee died 1/15/15 with no heirs. Petitioners request Court determination that the decedent's 100% interest in the real property passes to them in 50% undivided interests each.	NEEDS/PROBLEMS/COMMENTS: <u>Note:</u> Petitioners were previously self-represented. Pursuant to Substitution of Attorney filed 5/26/15, Petitioners are now represented by Attorney Michael M. Buettner. <u>Examiner Notes previously stated:</u> 1. The decedent's daughter Georgia Ann Portee survived the decedent; therefore, it appears the property must pass 1/3 each to Petitioners and to the post-deceased heir's estate pursuant to Probate Code §§ 11801, 11802. Petitioners may wish to consider a special administration of Georgia Portee's estate for the special administrator to join as a petitioner in this petition and thereafter to effect distribution of her estate via small estate affidavit or other summary procedure. Declaration filed 5/26/15 states Georgia Ann Portee died intestate, unmarried, with no issue and no parents. Petitioners state they are the intestate heirs of Georgia Ann Portee. <u>Examiner's Note:</u> Probate Code §11802(c) provides that if a person entitled to the beneficiary's share proceeds under Division 8 (commencing with §13000) (disposition of estate without administration), distribution shall be made under Division 8. Therefore, it would appear that distribution would need to proceed as noted in #1 above. Petitioners' declaration does not provide authority for skipping this step.
Cont from 030415			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail w		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
Reviewed by: skc			
Reviewed on: 4/30/15			
Updates:			
Recommendation:			
File 18 - Furlow			

Petition for Appointment of Guardian of Minor (Estate)

See petition for details.			NEEDS/PROBLEMS/ COMMENTS:
			<u>Note:</u> Page 27 is a petition re the estate of this minor's sibling.
			<u>Note:</u> Pursuant to Local Rule 7.8.4.I, it is the policy of the court to block <u>all</u> funds in guardianship estates.
			<u>Minute Order 6/2/15:</u> The Court directs Petitioner to pursue any Social Security benefits that could be available. The Court advises counsel that it is willing to consider blocked accounts in lieu of bond.
			1. If \$49,000.00 is to remain unblocked, bond including cost of recovery pursuant to Cal. Rule of Court 7.207 should be \$55,000.00.
			2. Need Order to Deposit Money Into Blocked Account (MC-355).
			<u>Note:</u> If granted, the Court will set status hearings as follows:
			<ul style="list-style-type: none"> Tuesday, July 21, 2015 for filing of bond and/or receipt for blocked account Tuesday, Nov. 2, 2015 for filing of Inventory and Appraisal Tuesday, Sept. 6, 2016 for filing the first account
			If the proper items are on file pursuant to Local Rule 7.5, the status hearings may come off calendar.
			Reviewed by: skc
			Reviewed on: 6/9/15
			Updates:
			Recommendation:
			File 26 - Directo

Cont from 060215		
	Aff.Sub.Wit.	
✓	Verified	
	Inventory	
	PTC	
	Not.Cred.	
✓	Notice of Hrg	
✓	Aff.Mail	W
	Aff.Pub.	
	Sp.Ntc.	
✓	Pers.Serv.	W
✓	Conf. Screen	
✓	Letters	
✓	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
	9202	
✓	Order	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
	FTB Notice	

Petition for Appointment of Guardian of Minor (Estate)

See petition for details.			NEEDS/PROBLEMS/ COMMENTS:
			<u>Note:</u> Page 26 is a petition re the estate of this minor's sibling.
			<u>Note:</u> Pursuant to Local Rule 7.8.4.I, it is the policy of the court to block <u>all</u> funds in guardianship estates.
			<u>Minute Order 6/2/15:</u> The Court directs Petitioner to pursue any Social Security benefits that could be available. The Court advises counsel that it is willing to consider blocked accounts in lieu of bond.
			3. If \$49,000.00 is to remain unblocked, bond including cost of recovery pursuant to Cal. Rule of Court 7.207 should be \$55,000.00.
			4. Need Order to Deposit Money Into Blocked Account (MC-355).
			<u>Note:</u> If granted, the Court will set status hearings as follows:
			<ul style="list-style-type: none"> Tuesday, July 21, 2015 for filing of bond and/or receipt for blocked account Tuesday, Nov. 2, 2015 for filing of Inventory and Appraisal Tuesday, Sept. 6, 2016 for filing the first account
			If the proper items are on file pursuant to Local Rule 7.5, the status hearings may come off calendar.
			Reviewed by: skc
			Reviewed on: 6/9/15
			Updates:
			Recommendation:
			File 27 - Directo

Cont from 060215		
	Aff.Sub.Wit.	
✓	Verified	
	Inventory	
	PTC	
	Not.Cred.	
✓	Notice of Hrg	
✓	Aff.Mail	W
	Aff.Pub.	
	Sp.Ntc.	
✓	Pers.Serv.	W
✓	Conf. Screen	
✓	Letters	
✓	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
	9202	
✓	Order	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
	FTB Notice	